

# Alcoholic Beverages and Long Term Effectiveness

**chemistry**

Coors Light: To The Rockies and Back  
Chemistry

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## COMPANY PROFILE

Chemistry is an independent autonomous full service communications agency. Founded in 1999, the agency has carved out a reputation as one of the most creatively awarded agencies in this market. Our pursuit of creativity however, is not just for creativity's sake. It's because in a cluttered communications landscape, and the memory game that is advertising, creativity is what works.

Chemistry's approach is to seek out the most differentiating and motivating thing we can say about a brand and then say it in the most differentiating and motivating way possible. This is our definition of creativity. Through a combination of relentless strategic questioning and thoroughness in approach we produce communications with the greatest cut-through and memorability in the market. Because it is largely through its communications that consumers judge any brand.

## INTRODUCTION & BACKGROUND

Coors Light was launched in Ireland in 1997 in bottle & can and in 2002 in draught, brewed under license by Heineken Ireland Ltd.

Chemistry started working with the brand in 2004. We found a great product, with strong quality credentials and a brand with massive potential, but with a mountain to climb.

The problem lay partially in its name. Launched in America in the mid 70s, the Light variant was positioned as a lighter alternative to Coors. Within 20 years that market was dominated by the Light segment; with Bud Light and Coors Light in the top spots.

While it was America's No. 2, the Irish market had no history of a Light beer. Without information to the contrary, the target of 18-34 year old men had defaulted to several interpretations for Light, all negative:

- Low calorie
- Low ABV
- Low taste

Any combination of the above added up to the same thing – beer for women. As one consumer commented:

“Some guys would drink it and not worry about what people think, but there is definitely a “girly” stigma.”<sup>1</sup>

For young men, the image of a beer brand is as important as its quality, to be seen as girly was highly alienating.

Our core competitors were at the lighter (tasting) end of the beer market; many of whom had deeper pockets and some of whom were among the most established brands in Ireland. That mountain was getting steeper.

A further challenge to our ascent was the fact that the beer market in Ireland was in decline and continues to be.

Coors Light then had to challenge big established players, and outperform the

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1. Male non-Coors Light drinker aged 22, Spinach Packaging research October 2005

market, and radically altering consumer perceptions. A tasty challenge. This case study tells the story of how we did it.

## MARKETING OBJECTIVES

The business objective for Coors Light was to develop a brand which catered for the growing demand for a lighter tasting beer.

The marketing objectives for Coors Light were around gaining a foothold within the lager market, stealing share from competitor brands by targeting young 18-34 year old men with an entry level lager. Our bullseye consumer was 23 years old.

Table 1. Key Performance Indicator levels 2005

Key Performance Indicator	Description	2005 MAT
<b>Acceptance</b>	As measured using Hall & Partners 'Consideration Scale' – see below. An indication of loyalty.	32%
<b>Involvement</b>	Agreement with statement that Coors Light is “a brand for people like me” / “a brand I'd have something in common with”. Considered vital for movement up the consideration scale (above).	16%
<b>Salience</b>	Agreement with statement that ‘it’s a brand that stands out / really has a lot going for it right now’ applies to the brand, at a level 6 or above on 10 point scale where 10 is ‘Applies completely’ and 1 is ‘doesn't apply at all’ Considered pivotal at point of purchase.	24%
<b>Good Quality</b>	Agreement with statement that ‘good quality’ applies to the brand, at a level 6 or above on 10 point scale where 10 is ‘Applies completely’ and 1 is ‘doesn't apply at all’	31%
<b>Awareness</b>	Spontaneous brand awareness	24%

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Silver Award - Coors Light: To The Rockies And Back  
Chemistry



A TASTE  
BORN HIGH  
IN THE  
ROCKIES



SINCE 1873

ENJOY **Coors**LIGHT RESPONSIBLY



THEY RUSHED  
FOR GOLD,  
STAYED FOR  
THE BEER



SINCE 1873

Enjoy **Coors**LIGHT Responsibly

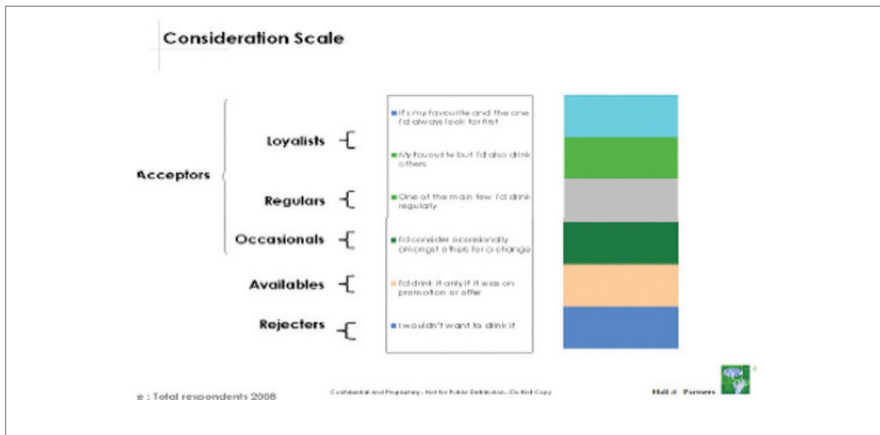


ENJOY **Coors LIGHT** RESPONSIBLY

AMAZING THINGS HAPPEN HIGH IN THE ROCKIES **Coors LIGHT**

The objective for communications, as a subset of the marketing objective, was firstly to engage with young men. We needed to create ‘permission’ for them to order this little known and misunderstood brand, and to connect with them on an emotional level, driving loyalty. Marketing activity also had to preserve the female consumer base, who made up the brand’s original loyal franchise. So while communications did not need to target female drinkers specifically (to do so would further distance young men), they could not alienate them.

The client and agency team identified key performance indicators, achievement of which would be essential to driving acceptance and loyalty among this audience. These key brand measures revolve around our need to convince on quality messages, to counter negative perceptions such as ‘girly beer’ and forge an emotional involvement with the brand. The table below lists those indicators we set out to improve along with the scores as they were tracked, when we started our journey in early 2005. Figure 1, also below illustrates the ‘acceptance scale’, the key metric we used to track consideration leading to acceptance and loyalty among consumers.



## THE TASK

The task we embarked on was interesting in a number of ways:

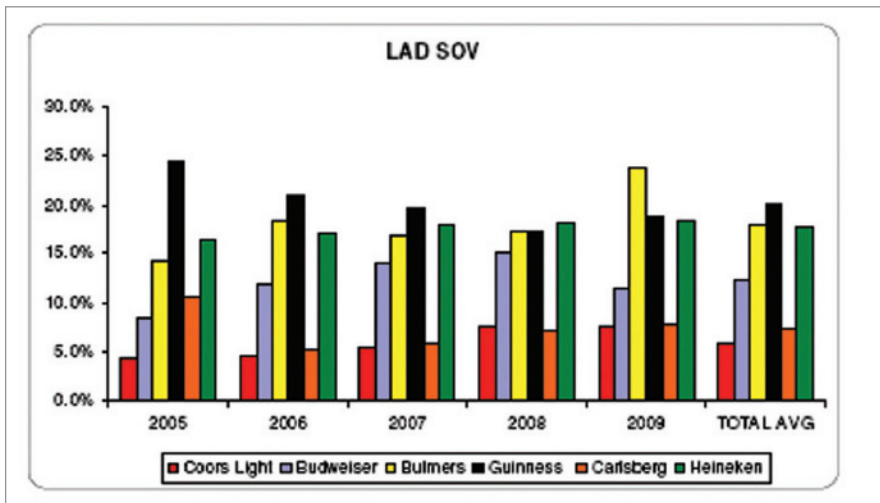
**Defining the brand:** A key challenge was that of making a brand called ‘light’ relevant and appealing in the very male beer market. We needed to counter negative perceptions around ‘Light’ and claim a positive market position for Coors Light.

This became even more interesting because of the precedent set in the US. An

analysis of activity there taught us that while originally launched as lighter tasting, light beers grew to dominate the market. We knew there were lessons to be learned, and also that Coors Light was a brand rich in history. The interesting part was how to capitalize on that.

Tricky audience of conspicuous consumers: This target audience are notoriously difficult to reach and to engage. Highly marketing literate, they are conspicuous consumers, and employ brands as badges with which to define themselves. Their choice of beer brand also reflects on them and calling for a ‘girly beer’ implies a lack of discernment. If they think it’s a beer targeted at women, young male consumers will simply not engage at all, feeling it’s not a brand for them.

Figure 2: Share of Voice LAD market



Big competitors: Finally Coors Light has had a small share of voice versus the heavy hitting established players in the market. Our Share of Voice over the period in question (04-09) averaged 6% versus Budweiser’s 12.34%, Guinness average spend of 20.09% and Bulmers 18.08%<sup>2</sup> – see figure below. The barriers to entry into this market were high, and to gain any kind of foothold we had to outsmart the big players, and we couldn’t use brute share of voice to achieve it.

2. IAPI / Nielsen Long Alcoholic Drinks Market Adspend figures 2005-09. Includes Bud and Bulmers Light variants. Based on comparative ratecard figures and do not include client discounts.

A declining market: The beer market in Ireland has been in decline for more than 5 years at a rate of -3.6% (CAGR) on average over the last 5 years (2005 – 2010).

The market has certainly seen a cultural shift towards wine and spirits, but also a shift away from the on trade which has not necessarily translated into off trade consumption. Key influences on the shift away from pub drinking include the smoking ban, tougher drink driving limits and of course the impact of economic recession on disposable income. This decline in the beer and lager market made our task all the more challenging – and more opportune.

## THE STRATEGY

We knew that the task at hand was significant – given the lack of relevance Coors light held for consumers. Irish men weren't engaging with the brand to anything like the degree needed to make an impact in a tough market. Worse, some were actively rejecting it, on the basis of negative perceptions around it just not being a regular beer.

Our approach was led by our consumers. Quantitative brand tracking had indicated to us the complex mix of sentiments which influence beer brand choice among different audience cohorts. What was in common for all was the importance of a bedrock of 'real' beer credentials, the absence of which for Coors Light was certainly contributing to the consumer default understanding of a 'girly' or 'diet' beer.

Then there is the brand call. When standing at a bar in Ireland we order our beer by brand name, not by category. So for a new brand, achieving that brand call is pivotal. To do that, consumers have to be assured not just that the brand will meet their personal quality criteria, but that it will be widely understood by others as a credible choice. This issue is more acute for our target audience of younger men, as research had indicated that for them, their choice of beer is as important for what it says about them, as how it tastes to them.

Our strategy for Coors Light was to start from the ground up. Our consumers needed the reassurance of fundamental quality messages, which actively conveyed Coors Light's rich and credible beer heritage. This was to be our starting point, and this strand was referred to as 'authority'.

Our longer term strategic plan was that once we had established a foundation of differentiated but motivating quality messages, then we could move to



connect with the audience on a higher, more emotional level. This second strand of messaging would build affinity with the audience, responding to their needs for a beer brand which reflected well on them, by projecting a personality which was both relevant and appealing to them. This strand was called ‘affinity’.

Insights we derived from quantitative research suggested the formula of emotional and rational messaging which help develop a loyal consumer base. Qualitative research allowed us to explore just how.

## THE IDEA & COMMUNICATION ACTIVITY

We used quantitative and qualitative research to inform the sequence, context and content of messaging to achieve our aims. We looked first to consumers, then to the brand to find the sweet spot.

### **Our consumer**

Our bullseye consumer was a 23 year old man, a first jobber. Entry into the world of work is a period of redefinition. Within this weekends take on a new significance, and his beer brand must meet his need for release, for new experiences and for spontaneity which are now restricted.

At this period of flux, when our consumer is mixing with different age groups, he will use brands as tools with which he (re)defines himself on different occasions. In all cases Coors Light must be a credible & relevant choice; he can’t risk a slagging for ordering it.

### **Asserting Authority**

Our brief for communications was to convey our real beer credentials with the proposition that Coors Light is a real beer from a unique place.

The creative idea came from the brand’s story. In 1873 Adolph Coors chose to locate his brewery in the seemingly inhospitable Rocky Mountains because of the mountain spring water he found there. Coors then famously packed his beer on ice and shipped it by rail, delivering it, as brewed, at 2 degrees, to offer the ultimate in refreshment.

Coors Light’s unique provenance provided a great quality story and the masculine cues we needed. This was a brand with a rich heritage, which we knew was important:

“Lots of beers go on about tradition -it reassures you about their years of experience. I like to know about the little place where it started, how it grew up -the usual bullshit. It’s damn important”.<sup>3</sup>

We used a classic strapline ‘A Taste born high in the Rockies’, placed on dramatic landscapes of the wild Rocky Mountains, replete with masculine and refreshment quality cues, and featuring delivery by train of Coors Light. We used qualitative research to affirm our thinking.

Striking visual appeal and credibly dramatic landscape provides endless opportunities for impact and involvement.<sup>4</sup>

### **Communications strategy Authority**

In line with McLuhan’s famous observation, the media selected for authority communications reflected our message. In order to be considered a real beer, Coors Light had to behave like a real beer.

This meant brand presence in large format outdoor, double page ‘feature’ press TV and cinema (late ’05). The approach to media reflected real beer credentials, and also the best opportunities to exploit the creative idea. The outdoor and press images presented a highly engaging ‘hyper real’ vision of majestic Rocky Mountains; and the outdoor plan (and regulatory environment) stretched to 144 sheets, 96 sheets and large spreads. TV planning was based around high indexing young male programmes and key sports environments. We used cinema to exploit the drama within the Authority ‘Journey’ TVC, which brings the viewer on a thrilling train ride from the Rockies out into the plains.

### **Driving Affinity**

Our longer term (3-5 year) strategy was that having established a foundation of quality, we could then start to introduce Coors Light personality.

Quantitative research at the end of year 1 showed a gradual improvement in acceptance levels; the authority stream was working.

Our qualitative research findings backed this up; the advertising had been positively received, and interpreted by consumers as an assertion not just of quality, but of commitment.

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3. Male Non Coors Light drinker, Spinach Brand research October 2005

4. Spinach Advertising Concept research December 2005

8. Orchard Advertising and Positioning Qualitative Research debrief May 2005

“Advertising like this means its serious, not flash in the pan”<sup>8</sup>

In late 2006 the time was right to introduce affinity stream. The brief to creative team was to reinforce the ‘real beer from a unique place’ proposition by dramatizing the emotional appeal of its birthplace.

The creative idea was ‘Amazing things happen high in the Rockies’. This resonated with our insight that our consumer places a particular emphasis on experiences, and the unexpected.

For this consumer, money is less than important than real experience. “I wouldn’t trade my last four summers for a Ferrari”. What he values most cannot be bought. Life is about accumulating experiences; this is real equity.<sup>9</sup>

The first affinity ad, ‘Snow’, depicted the amazing things that happen in the Rockies by positioning them as an adult playground. This became the theme for the two subsequent years of communications.

### **Communications Strategy - Affinity**

Our brief here was all about driving engagement. It was about creating impact using high indexing affinity environments programming and phasing spends into cost efficient months to elongate communications.

Our plan was versatile and meant we could adjust the roll out of the two strands in anticipation of, and reaction to market shifts. The campaign chronology below shows how the creative ideas evolved and the two strands were delivered.

## **THE RESULTS**

Coors Light’s achievements over the period are as below. For the purpose of this case study we have taken year end results 2009, as early 2010 saw very little advertising activity.













This growth has been achieved despite a smaller than share of voice versus the established brands in the category, and in the face of a shrinking market.

In terms of shifting perceptions around the brand, Coors Light has also

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9. Orchard Positioning Project debrief July 2006

Table 2: Campaign Chronology

Year	Title	Description	Thumbnail image
2005	Authority: Trains outdoor 05	Large format landscapes of impressive Rocky Mountain vistas, featuring trains & tagline 'A Taste Born High in the Rockies' with Coors Light brand device or 'roundel'.	
		As above	
	Authority: Trains large format press	Double page spreads	
2005	Authority: Journey TV & Cinema	Dramatic black and white film depicting descent of Coors Light train from icy peaks into plains	
2006	Authority II: Miners Outdoor	Coors Light: originally brewed to quench the dusty-throated thirst of gold miners	
	Authority II: Inspire Outdoor	Coors Light: brewed in an inspirational location	
2006	Wolf	Tells the story of how Adolph Coors may have stumbled across the perfect place to brew his beer	
2007	Affinity TV I: Snow	'Amazing things happen high in the Rockies'	
2007	Snow Outdoor	Quality message resonating with striking TV visuals from 'Snow'	
2008	Affinity TV II: Pinball	A mountainside provides the location for a giant amazing game of pinball	
2008	Authority TV: Majesty/Ice/Waterfall	Scenes from the home of Coors Light; with a smile	
2009	Affinity TV III: SnowStory	The Rockies: a snow white icy playground	

## Results after 5 years

<b>Market Share</b>	5.4% volume share of lager (MAT November '09)
<b>Market position: bottle</b>	Number 2 lager bottle in on trade bottle on YTD Nov 2009
<b>Market position: draught</b>	Number 4 in draught lager nationally (from launch in '02)

exceeded expectations, and continues to grow. This shift in brand perceptions is mirrored, or exceeded by growth in brand awareness.

Involvement measures for the brand have leapt from 11% MAT in July 2005, to 21% in 2009, salience and the feeling that this is a brand with a lot going for it has increased from 20% to 33% and acceptance has grown to a level of 34% in September 2009 from a level of 26% in five years (see figure 5 below).

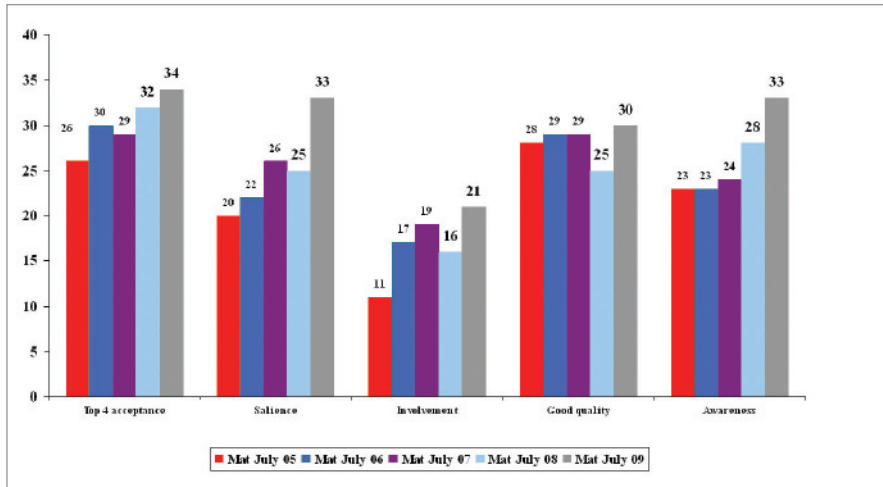


Figure 5: Growth in key brand measures 2004-2009 (10)

### How did we achieve this?

The ads were noticed

Coors Light advertising has consistently cut through to very strong levels, as tracked through unbranded recognition of stills & correct brand association by respondents.

### The messages drove acceptance

Ad recognisers have consistently displayed higher levels of acceptance than non-recognisers. The ads cut through and delivered the right mix of messaging to drive acceptance over time.

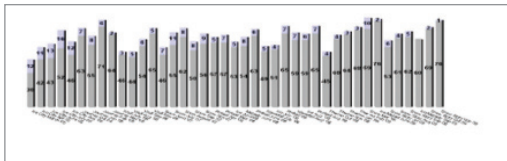


Figure 7: Advertising registration Coors Light 2004-2009.

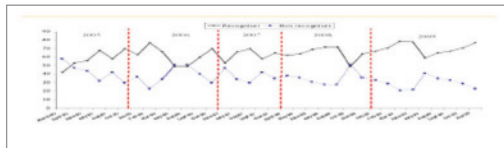


Figure 8: Acceptance over time recognisers vs non-recognisers.

And when correlated with growth in other key metrics, we can see that these acceptance levels (among recognisers), is driven by brand salience and involvement.

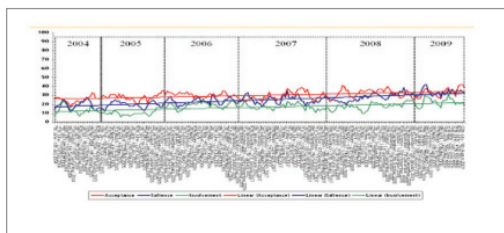


Fig. 9 Coors Light Acceptance tracking 2005-2009; Growth over time correlated with Stand Out and Affinity.

Recognisers of Coors Light's advertising felt more positively disposed towards the brand, with more than half (55%) saying that the communications made them feel like Coors Light is genuinely better than other lagers. This feeling of positivity peaks directly after each communications burst, reaching a peak of 76% following 'Snowstory' launch in August 2009.

### Were other factors influencing this growth?

**Distribution:** Coors Light had a nationwide presence in bottle from prior to 2004. The brand did increase its presence in draught over the period in focus, but as a reaction to growing demand from consumers.

**Price:** With the exception of occasional promotional packs in off trade, Coors

Light has maintained a sustainable pricing strategy. Coors .The brand has never competed on price, and its value growth outstrips its volume growth in the period in question.

Below the line: On & off trade promotions: Coors Light has incepted a range of promotional activities over the five years, which have contributed to the growth of the brand through, getting pints into young men's hands at events and in promotions in bars. This trial activity at the point of purchase also built taste credentials and stimulated rates of sale in particular accounts.

Broader effects of the advertising: Despite initially dogged with negative consumer perceptions, Coors Light has taken on the mainstream beers, and achieved market share growth in excess of the biggest among them. Increasingly today's young men readily understand that a Light beer offers a lighter tasting, easier drinking alternative to mainstream lager. By starting to turn perceptions, Coors Light has created a star in a declining market.

### IMPACT ON BEHAVIOURAL ATTITUDE & PAY BACK

Payback: The brand has beaten the market, in a period where the market declined by 3%, Coors Light grew by 25% volume, creating a prime vehicle for growth for its brewer, worthy of all of the investment behind it.

The rate of growth is increasing steadily year on year. Results from summer 2010 showed that Coors Light had attained the top spot in bottled lager in the on trade nationally.

This case study has demonstrated the correlation between investment in advertising, and growth in volume sales and market share. Further we have proved a causal relationship between the two, and the cornerstone of this relationship is brand.

Changing attitudes: As we have argued, the Irish drinker orders by brand, and while presence in tap at the bar is undoubtedly a factor in making it onto his repertoire, there are multiple brands competing for his attention. Brand call is a key part of our pub culture, and that is influenced by a complex mix of perceptions and sentiments which go to make up that brand.

Coors Light has grown its brand over the last five years, to a point of strong and growing acceptance. By paying attention to, and countering negative perceptions, the brand countered the reasons for rejection by young male

consumers, and played to its strengths as a great tasting, easier to drink alternative to mainstream lagers, with a heritage and identity to relate to and respect. It managed to achieve this despite a share of voice disadvantage versus its competitors, and without discounting its way into consumer repertoire. By a carefully planned sequence of messages, first around being a decent brew, worthy of respect, and then the gradual reveal of an appealing and engaging personality, this brand has captured a lucrative and growing market share. The Rocky Mountain peak is within reach.

## SUMMARY

### **Coors Light: to the Rockies and back**

Coors Light is a market star. While the beer market declines it continues to ascend.

To do this, it has come from a position of being perceived by its target of Irish men as a ‘girly beer’, to one of growing acceptance, and interest. Coors Light entered a market dominated by some of the biggest, most established brands in Ireland, with a smaller share of voice, smaller distribution and some heavy baggage.

This paper shows how a carefully executed strategy of building first the foundations of quality, then progressing to a higher level connection with consumers, allowed us to bring the brand to the level of acceptance needed for men to feel happy calling for a Coors Light at the bar.

Coors Light has achieved 25% volume growth in 5 years, and not at the expense of value. This was while the market slowly declined in an environment of economic recession, and regulatory inhibitors to in-pub drinking. In so doing it’s created a valuable growth brand for its brewers.

“A taste born high in the Rockies”: the strapline encapsulates the brand’s essence, the reason to believe its great quality story, and a point of connection with it. It was our pleasure to bring this unique brand story to life, and respond to the consumer desire for a credible light beer brand.

The brand is growing and the mountain’s peak is now within reach.